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## **Austria**

### **Product Brief**

## **Austrian Nursery Product Market 2000**

Approved by:

**Allan Mustard**

**U.S. Embassy Vienna**

Prepared by:

Walter Krucsay

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#### **Report Highlights:**

**Austrian production of nursery products does not meet the large market demand. Thus, significant quantities are imported. Main suppliers are Germany, Netherlands, and Italy. Deliveries from central Europe are considerably smaller. Imports from the U.S. have been marginal so far. Nevertheless, there are market opportunities for U.S. products, particularly for niche products.**

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Includes PSD changes: No  
Includes Trade Matrix: No  
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## Austrian Nursery Product Market

### Summary

Austria's 300 nurseries with a total area of 1,400 hectares have an annual turnover of slightly more than AS 1 billion. Domestic production includes most nursery items. However, as the market exceeds domestic output, considerable quantities have to be imported. The main trading partner is the EU, particularly Germany, Netherlands, and Italy. While young plants come practically only from EU countries, ready to sell plants are also purchased from central European countries. So far, imports from the U.S. have been marginal. However, there are market opportunities for U.S. products, particularly niche products. Phytosanitary regulations of directive EEC 77/93 must be observed. End summary.

### Production

In Austria there are around 300 nurseries with a total area of 1,400 hectares. Most of them are in Upper and Lower Austria (northern and north eastern parts) and in Styria (south eastern part). About 90% of them are not only producers but also wholesalers and retailers. Many of these nurseries, in general the larger ones carry out also imports.

Domestic production includes most major nursery products. However, many items are not produced in sufficient quantities or are not produced at all because of adverse climatic conditions.

There are no production figures available. However, the area distribution gives an idea of output of the various product groups. The following areas were registered in 1998: fruit trees 1,428 ha, roses for sale 187 ha, deciduous trees 319 ha, deciduous bushes 267 ha, coniferous trees 319 ha, forest plants 54 ha, perennials and alpine plants 15 ha, cultivation area for young plants 35 ha, and container area 84 ha. The remaining area includes areas where mother-plants are kept and storage, exhibition, and sales areas. The total nursery turnover was AS 1,055 in 1998.

Besides private garden owners and city gardens, nurseries supply to a large extent landscape gardeners and cemetery gardeners with products they need.

The main trading season for nursery products is spring. About two thirds of the total annual sales is carried out during this season and one third in fall. Turnover in summer is small and in winter nurseries are closed.

### Organization

All nurseries are members of the Federal Section for Nurseries (address: Draschestrasse 13 - 19, A - 1239 Vienna, Austria; phone: +43 (1) 610-2514, fax: +43 (1) 610-2521), which is part of the Federal Association of Professional Gardeners. The latter includes also the federal sections for vegetable production, ornamental plants, cemetery gardeners, and landscape gardeners.

### Market

At present, there is a distinct trend away from conifers to deciduous trees. In addition, there is rising demand for topiary plants. Topiary figures are made mainly of bux, thorn palm (*Ilex crenata*), yew tree, and ivy.

### Trade

- Young plants: These plants which have to be cultivated 1 - 2 years in Austrian nurseries to adjust to local conditions etc. This is done in plastic-sheeting greenhouses under controlled atmosphere. Young plants are imported from Germany, France, Belgium, and Italy. They include juniper, spruce, pines, veigilia, and the entire deciduous assortment.

- Ready plants (container articles): These are older than the above products and can be sold immediately without adjustment time in a nursery. They come from all western countries and central European countries. Italy and Hungary supply large quantities of alley trees; Sweden and Denmark winding plants such as clematis; Germany, Belgium, and France pine trees.

In 1999, imports of rhododendrons were 600 MT valued at AS 22 million. All deliveries came from the EU, predominantly Germany, Belgium, and Netherlands.

Roses are mainly imported as grafted products (65%). In 1999, the total import quantity was 2 million flowers valued at 31.7 million. Main suppliers were Germany and Netherlands. Denmark was a relatively strong supplier of ungrafted roses.

Deliveries of rhododendrons and roses from central European countries were small.

In 1999, imports of young plants or cuttings of trees and bushes were 6,600 MT valued AS 56.2 million. Around 53% came from other EU countries and the rest from Mali. Among EU countries Germany and particularly the Netherlands were the predominant suppliers. In the preceding years practically no young plants were imported from developing countries.

In the same year, imports of ready-to-sell trees and bushes were 10,500 MT, valued at AS 156 million. More than 75% came from the EU, mainly Netherlands, Germany, Italy, and Belgium. Almost all of the remainder was delivered by eastern central European countries, particularly Hungary. Imports from the U.S., Taiwan, and developing countries were marginal.

Imports of perennial flowering plants were 1,800 MT valued at AS 63 million. Almost 80% came from Germany and the Netherlands and the rest from Denmark, Italy, Belgium, and France.

Of other outdoor plants, such as rolls for lawns, 6,100 MT valued at AS 155 million was imported in 1999. Around 95% came from other EU countries and the rest from central European countries.

In general, imports from the U.S. and other non-European countries are marginal.

Except for "other outdoor plants", (mainly rolls for lawns) of which 1,700 MT valued at AS 36.3 million were exported, exports of nursery products were only 900 MT valued at AS 24 million. The bulk of Austria's exports were intended for central European countries and to a lesser extent for EU countries.

### Import Regulation

#### a. Phytosanitary Requirements

Trade in nursery products with respect to phytosanitary inspection is regulated by EU directive EEC 77/93.

Attachment Va of this regulation includes all plants which need a plant pass if traded within the EU. The pass shows that the products are free of certain pests and fulfill certain conditions. Nursery producers fulfilling certain requirements are approved to issue plant passes for their own products.

For imports from third countries like the U.S., the following attachments of the aforementioned regulation must be observed.

I: includes all pests which may not occur on any object, including packaging material;

II: includes all pests which may not occur on imported plants or plant products;

III: lists all products whose imports into EU countries are forbidden;

IV: special requirements, e.g. controls three months before shipment, non-occurrence of a certain pest in a certain area, etc.;

Vb: commodity list; lists all products, which need a phytosanitary certificate if imported into the EU from a third country. Among other things, all plants intended for planting are included in the list.

As Austria is free of fire blight (*Erwinia amylovora*), it is a protected area concerning this disease. Imports of fire blight host plants (certain plants of the rose family) are not permitted from third countries. From EU countries imports are permitted from protected areas and special nurseries of unprotected areas if the nursery is approved as being free of fire blight. In this case, the plant pass indicates that the nursery is eligible to deliver to protected areas.

Like all EU nurseries, Austrian nurseries importing from third countries must be approved and registered as such. These enterprises are checked each year for documents and proper handling of products.

#### b. Import Duty

The import duty is as follows (calculated from import value):

- trees and bushes of edible fruits: 9.1%
- cuttings without roots and grafts  
of non-fruit trees and bushes 4.7%
- cuttings with roots and young  
plants of non-fruit trees and bushes 7.6%
- cuttings of grafted roses 9.1%

#### U.S. Opportunities

Although current imports from the U.S. are only marginal, there are opportunities for U.S. nursery products in the Austrian market. Best prospects include blueberries and cranberries, certain ginkgo and elderberry types. To date, no ginkgo varieties without seed formation are on the Austrian market. However, municipalities would appreciate such ginkgoes for alleys because they do not shed their foliage. In addition, salt resistant elderberries would probably sell well in Austria. As on most roads salt is spread in winter, many of the current alley trees suffer. However, there are few opportunities for U.S. conifers because the demand for these products is declining at present.

#### Trade Channels

U.S. traders interested in exporting nursery products to Austria should contact Austrian nurseries eligible to import from third countries. Nurseries cultivate young plants for later selling to end-users and/or sell to other nurseries. There are some nurseries which formed buying/importing groups to acquire the products cheaper. Certain members buy certain products in large quantities which are shared with other members of the group. It is expected that in some years most of the nurseries will be organized in such buying groups.

#### Potential Importers of Nursery Products

Dipl. Ing. Novit Ivanovic  
Rößlergasse 16+18  
A - 1230 Wien  
Phone: +43 (1) 667 6556  
Fax: +43 (1) 665 8515

Ing. Herbert Eipeldauer  
Lainzerstr. 99  
A - 1130 Wien  
Phone: +43 (1) 877 8156 &57  
Fax: +43 (1) 877 9655

Ferdinand Schick

Süßenbrunnerstr. 11  
A - 1220 Wien  
Phone: +43 (1) 282 1636 - 38  
Fax: +43 (1) 280 6079

Jens Passecker  
An der Stadlhütte 2/4  
A - 3011 Untertullnerbach  
Phone: +43 (2231) 666 55  
Fax: +43 (2231) 666 55

Anton Starkl  
Frauenhofen 32  
A - 3430 Tulln  
Phone: +43 (2272) 64 242  
Fax: +43 (2272) 63 670

Alfred Weber  
An der Baumschule 10  
A - 2486 Pottendorf - Landegg  
Phone: +43 (2623) 72 282  
Fax: +43 (2623) 73 526

Melasur Kaljosi  
A - 3032 Eichgraben  
Phone (cell phone): +43 (0664) 3011 419  
Fax (& phone): +43 (2773) 426 81

Werner Mueller  
Weidlingbachstr. 29  
A - 3021 Pressbaum  
Phone: +43 (2233) 52 342  
Fax: +43 (2233) 52 342

Ing. Franz Praskac  
Postfach 60  
A - 3430 Tulln Feundorf  
Phone: +43 (2233) 52 342  
Fax: +43 (2233) 52 342

Helga Kottik  
Werthfeldstr. 33  
A - 3441 Baumgarten bei Tulln  
Phone: +43 (2274) 7265

Fax: +43 (4242) 72654  
Josef Nentwich  
Dorfstr. 19  
A - 3142 Weisskirchen/Persching  
Phone: +43 (2784) 2235  
Fax: +43 (2784) 2650

Dipl.Ing. Reinhard Ranseder  
Huebing 28  
A- 4980 Antiesenhofen  
Phone: +43 (07759) 44004  
Fax: +43 (07759) 5566

Markus Ranseder  
Huebing 22  
A- 4980 Antiesenhofen  
Phone: +43 (07759) 5565  
Fax: +43 (07759) 5505

Karl Landlinger  
Baumschule Grossboetzl  
Hart 35  
A - Ort im Innkreis  
Phone: +43 (07751) 8317-0  
Fax: +43 (07751) 8317-3

Alois Stoeckl  
Wildhag 14  
A-4755 Zell an der Pram  
Phone: +43 (07764) 83350  
Fax: +43 (07764) 833524

Dipl. Ing. Manfred Bayer  
Baumschulgasse 2  
A - 8230 Hartberg  
Phone: +43 (3332) 624 21  
Fax: +43 (3332) 624 2124

Christine Smrz-Kern  
Petersbergbenstr. 17  
A - 8042 Graz-St. Peter  
Phone: +43 (316) 471 417  
Fax: +43 (316) 465 238



Max Ledolter  
Petersbergbenstr. 17  
A - 8045 Graz-St. Andritz  
Phone: +43 (316) 692 167  
Fax: +43 (316) 698 409

Siegfried Schiller  
A - 7412 Wolfau 140  
Phone: +43 (3356) 388  
Fax: +43 (3356) 7745

Friedrich Hubner  
Pischeldorferstr. 64  
A - 9020 Klagenfurt  
Phone: +43 (463) 511 295  
Fax: +43 (463) 511 2954)

Karl Gerhard  
Magdalenerstr. 25  
A - 9500 Pottendorf - Landegg  
Phone: +43 (4242) 42 043  
Fax: +43 (4242) 44 150

Hermann Wandaller  
Zehenthofstr. 20  
A - 9500 Villach  
Phone: +43 (4242) 41 557  
Fax: +43 (4242) 44 120